



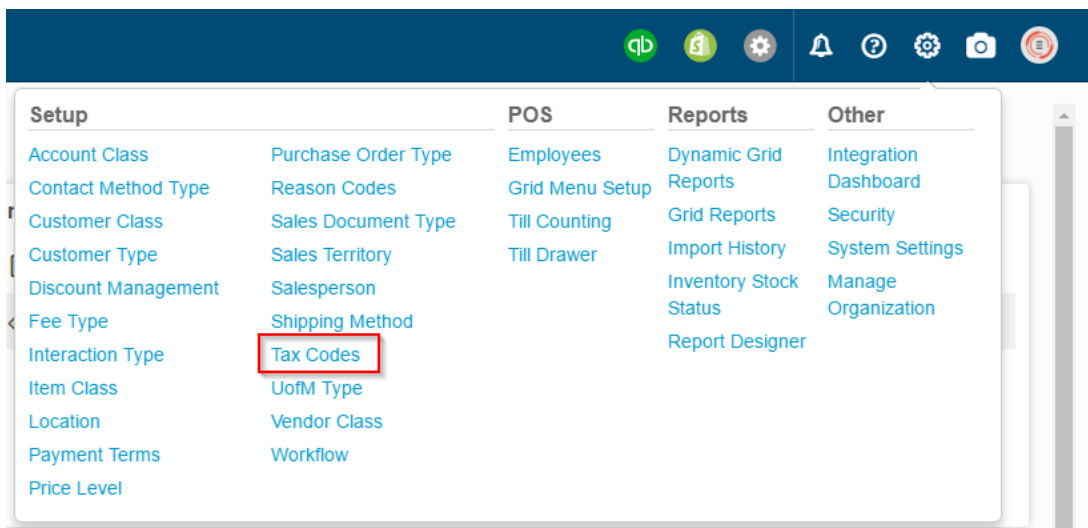
## Tax Codes

Megan De Freitas - 2024-12-02 - Settings

### Overview

Tax Codes help you account for sales tax as you conduct your business. Tax Codes are created in your QuickBooks Online account and imported into your SalesPad Cloud company when the QuickBooks Online integration runs.

To get started, select **Tax Codes** from the Settings menu.



### Navigation Menu

- [View Tax Code Details](#)
- [See it in Action](#)

### View Tax Code Details

To view Tax Code details, click on the Tax Code you wish to view from the list on the left-hand side of the screen.

The screenshot shows the 'Tax Codes' list in SalesPad. The list has two columns: 'Tax Code' and 'Tax Rate Name'. The 'Tax Code' column has a dropdown arrow and the 'Description' column has a dropdown arrow. The 'Tax Rate Name' column has a dropdown arrow and the 'Tax Value' column has a dropdown arrow. The list contains one entry: 'Michigan Sales Tax' with a tax value of 6%.

Tax Code	Description	Tax Rate Name	Tax Value
Michigan Sales Tax	Michigan Sales Tax	Michigan Sales Tax	6%

If you wish to make changes to a Tax Code, you must make the change in QuickBooks Online. The change will not appear in SalesPad Cloud until the QuickBooks Integration runs (integrations run every 10 minutes).

[Back to Navigation Menu](#)

**See it in Action**

Tax Codes are assigned to Contacts in the Create or Edit [Customer](#) drawers.

## Create Customer ✕

Billing Address

Shipping Address  Use Billing

Contact Code

Contact Person

Salesperson  

No Salesperson▼

Shipping Method  

No Shipping Method▼

Location  

No Location▼

Phone Number

Ship Complete  
 Admin Lock  
 Is Custom

Tax Code  

No Tax Code▼

Email

Print Contact

SalesPad Cloud uses the *Contact Used for Tax* setting in the Sales Settings section of [System Settings](#) to determine taxes charged on a sales document. If the item(s) on the sales document is taxable, it will be taxed based on the Tax Code found on the shipping address for this contact. The default for this setting is the Shipping Contact, but it can be changed to the Bill To Contact.

[Back to Navigation Menu](#)